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Stress, Stressors, Morale:
An 8th Infantry Division
(Mechanized) Post-REFORGER Study

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Abstract

Central Guardian, the winter REFORGER of 1985 provided Blue and Orange Forces the opportunity for Division-level combat training during a very cold and snowy German January. The combination of intense training and demanding weather conditions created a superb test for units and soldiers alike. What stressors predicted the overall stress experienced by soldiers? Did combat soldiers show higher stress levels than their combat support counterparts? Was morale affected by whether the unit was on the offensive or defensive? These and other questions relating to stress levels, stressors, and morale were asked during a post-REFORGER study. The findings are discussed in relation to how commanders can better prepare their units for the stresses involved in a major training exercise.

Regardless of the sophistication level of an army's technology, that army's fighting effectiveness is always dependent on the abilities of the soldiers who service and exploit that technology. Thus, stress and morale play important roles in the ultimate outcome of training exercises or real wartime battles. As Richardson (1978) noted, "Man is still the first weapon of war and the morale

of the soldier is the most important single factor in war.'" Knowing which soldiers are most stressed and what stressors are most potent, together with an understanding of how morale shifts during an exercise can all serve to aid the commander in preparing his soldiers to perform optimally over time -- during an exercise or during actual combat. Examination of these issues was accomplished by questioning 320 soldiers of the Blue Forces following their participation in Central Guardian, the winter REFORGER of 1985. 151 questionnaires were completed by Unit A, a USAREUR-based brigade. 97 questionnaires were completed by Unit B, a CONUS-based, active-duty brigade. 72 questionnaires were completed by Unit C, a CONUS-based, Reserve battalion (Table 1 provides a further breakdown of the sample population).

Realizing that Blue Forces were made up of many types of units, that is, some from USAREUR, some from CONUS, some from the Reserves, it was decided to question whether these units showed differences in the overall personal stress experienced. Comparisons among the three major units revealed no differences in the ratings of overall personal stress. This finding is surprising. The initial thought was that soldiers coming all the way from the States would incur more stress than soldiers stationed in Europe. In a related study, Rock (Valdez, 1985) found that soldiers coming over from CONUS during the 1983 REFORGER suffered proportionately fewer stress-related illnesses than the soldiers who lived in Germany. Findings from both these studies are not immediately explainable. Commanders could greatly benefit from knowing whether their soldiers are more vulnerable than others to stress based on the origin of the unit. Clearly, more research into this issue is needed.

Differences in overall personal stress levels were found between types of soldiers rather than units. Soldiers in combat support units reported significantly higher overall personal stress during Central Guardian than did their counterparts in combat units (Table 2). What might account for such a difference? Were combat support soldiers "less tough" than combat soldiers? Or, were there substantial differences in the situations faced by the two groups? Although this study cannot make a definite attribution of cause, some of the findings in this study strongly suggest that during an exercise like REFORGER, the combat support soldier actually faces more stress than his combat soldier counterpart. Despite 75% of the study's sample population being combat soldiers, 50% of the total sample believed combat support soldiers experienced more stress. Combat support soldiers were perceived to have more work to do. Combat soldiers "played" their roles during daylight hours. Support soldiers also played out the battlefield scenario, for example, wearing MOPP gear, "jumping" locations, providing area security. In addition, these soldiers were involved in performing their actual wartime missions: meals were prepared; fuel was provided; vehicles were repaired; water was purified, etc. In other words, the REFORGER exercise is a far more "real" and demanding

exercise for support soldiers than for combat soldiers. The higher stress levels reported by support soldiers reflects a very real difference in the demands encountered by these soldiers compared to their combat brethren. It is all too easy for commanders and researchers alike to focus attention on the "fighting" soldiers during an exercise. The findings of this study point out that such a focus can be misguided and ultimately very costly. During an extended training exercise the commander would be well advised to base his assessment of soldier morale on the status of his support soldiers.

Specific stressors were examined in addition to overall stress levels. Soldiers rated the importance of each of the following stressors: Lack of sleep; Amount of work; Separation from family; Food; Weather; Communication; Boredom; Personal hygiene; Uncertainty. Of these nine stressors only three showed significant power in predicting the overall stress ratings. These stressors were "Lack of sleep," "Amount of work," and "Uncertainty." Lack of sleep and Amount of work are two stressors that go hand in hand. It is improbable that future training or actual combat will involve "less work" to be performed. And with increased work demands come reduced sleep periods. This is hardly new or startling. However, the importance of this information for commanders is that it enables them to know in advance the problems most predictive of stress and thus, gives them the opportunity to prepare soldiers to cope better. One method of enhancing coping is by heightening awareness. If soldiers are aware that work will be plentiful and rest a luxury once in the field, they can be guided to realistic expectations and more adaptive behaviors, such as the adoption of sleep shifts. Heightened awareness by itself is rarely sufficient in reducing stress. An actual change in behavior is typically required and this translates into command emphasis and command example. The deficits in performance due to lack of sleep are well documented (Manning, 1979) and are most pronounced for those in leadership positions. Yet the tradition of being "tough" and not sleeping is one that dies very hard. At some point leaders must break through this taboo and set the example. Adoption of sleep shifts serves both the soldier and the mission.

"Uncertainty" is a stressor that will also always be with the soldier during an exercise or combat. Anyone in an uncertain situation looks to find ways of feeling in control and secure. It is during times of great uncertainty that a soldier's confidence in his unit and chain of command is truly tested. Commanders must ensure that each soldier understands that clarity and certainty of action will be rare for everyone during an exercise. Extended training exercises like Central Guardian bring with them the enhanced dual demands of trusting the chain of command and acting on one's initiative. The micromanagement that often characterizes garrison life will suddenly be replaced by much greater responsibility and freedom of action. Such a shift opens the door to great amounts of stress from "Uncertainty." Commanders are not immune to such shifts them-

selves. The need to develop realistic expectations of what they can and cannot control once in the field is, of course, part of the training process but much can be done prior to leaving garrison. Soldier's can carry realistic expectations into an exercise rather than be forced to develop them -- at great cost -- once in the field.

Rather surprisingly, "Boredom" and "Separation from family" were the stressors rated least important. Are these stressors truly insignificant or have commanders' efforts on these concerns begun to pay dividends? Boredom can be a problem during some training and during "lulls" in battle. Central Guardian's time table was demanding and a good case can be made that this REFORGER kept soldiers busy and on the move. With the weather being cold, most units could maneuver with little restriction, thus eliminating much dead time and ensuring soldiers were active. "Separation from family" is not a very weather-dependent stressor and from past experience (Manning, 1979) one that is important to many soldiers, particularly those stationed in Europe. While it is difficult to say why this stressor proved less important than most, it is believed that much has been done by the Army to improve the care given families. Only a few years ago the Army simply expected soldiers to take care of their family's needs prior to leaving on an exercise. Prior to Central Guardian it was commonplace for battalion-size units to organize activities specifically designed to aid spouses in preparing for the upcoming separation. Representatives from the various community support services speak to spouses and soldiers on what they can expect to have happen over a long separation and what help is available. Awareness of the role that families play in their command has been greatly heightened for commanders over the past few years. This enhanced awareness has generally been matched by greater command emphasis on preparing families as well as soldiers for long separations.

"Weather" proved to be a remarkably non-significant stressor. This was clearly not due to warm weather. The weather for Central Guardian was ideal: cold and snowy. Again, attribution of cause is difficult but some educated speculation based on extensive observation both prior to and during REFORGER is warranted. Command emphasis on the prevention of cold weather injuries was strong and extensive. Commanders could ill-afford the presentation of cold weather injuries from their units. Command's emphasis on the prevention of cold weather injuries probably had a direct impact on the importance of "Weather" as a stressor.

Morale showed considerable variation during the exercise. The common-sense view of a training exercise would suggest that morale would be highest during Redeployment, when the vast majority of the work is completed and everybody gets to go home. The data bear out this view. Throughout all sample subgroups, morale is highest during Redeployment (Graph 1). Morale during Deployment was not significantly lower than during Redeployment. Again, a common-sense appraisal of this finding seems most fitting. Most soldiers get "geared-up" for an exercise where they get to practice being "real"

soldiers.

Morale took a considerable and significant drop during both the Defense and Offense phases of REFORGER (Graph 1). The results suggest that the distinction made between Defense and Offense is unwarranted. Morale is the same for both "phases." Hence, an "operations" phase encompassing both Offense and Defense probably fits more closely with the soldiers' conception of REFORGER. Historically, morale is distinctly higher for soldiers "on the attack" than it is for those "on the defensive" (Strock, 1976). "Gaining ground," "moving forward," "pushing the enemy back" -- all are associated with being on offense and typically relate to enhanced soldier morale. Conversely, when soldiers are "on the defensive" and "being pushed back" morale usually suffers. The findings of this study indicate that soldiers see no distinction between Offense and Defense. Rather, in terms of morale, soldiers view Offense and Defense on an exercise as one reality, one that is more a matter of work and endurance than of winning and losing. Thus, commanders should be wary of trying to motivate troops by referring to the current exercise tactical situation.

Despite the difference in overall stress ratings by combat versus support soldiers, morale ratings of these two subgroups showed no difference.

From the list of summary descriptors (appendix 1), soldiers' choices tend to reinforce the other results (Graph 2). Soldiers often chose "tiring," "stressful," "frustrating," and "disorganized" as the best descriptors of their REFORGER experience. Disorganization will be felt most by those of the lower ranks who experience first-hand the endless and seemingly irrational changes inherent in conducting field maneuvers on a Division level. This reinforces the need for commanders to inoculate soldiers against unreal expectations of clarity and certainty while in the field.

There were some interesting differences among the major units on the choice of descriptives (Graphs 3,4,5). Both Unit B and Unit C report a much greater sense of "disorganization" than Unit A. On the other hand, Unit A soldiers report a much greater sense of REFORGER being "professional," "educational," and "informative." It is believed these differences stem mostly from the fact that Units B and C were "stepchildren" of the 8th ID(M), while Unit A was a "natural child" of the division. Units B and C had to travel clear from the States and be spliced into the division, a unit they are relatively unfamiliar with. It is realistic for these spliced units to feel more tired and disorganized than Unit A. What lessons can be learned? Every attempt at communicating the policies and standards of the gaining unit should be made prior to the exercise. A poor transition by the units from the States can be extremely costly in terms of battle readiness.

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TABLE 1

The Sample Population


The questionnaire (Appendix 1) was given to 320 soldiers of the Blue Forces, Central Guardian, the winter REFORGER of 1985.

- 1) The sample was comprised of soldiers from three major units:
 - Unit A: 151 soldiers from a brigade of the 8th ID(M)
 - 124 or 82% of respondents from combat arms units
 - 27 or 18% from combat support units
 - Unit B: 97 soldiers from an active-duty, CONUS brigade
 - 64 or 66% of respondents from combat arms units
 - 33 or 34% from combat support units
 - Unit C: 72 soldiers from a CONUS Reserve battalion
 - 54 or 75% of respondents from combat arms units
 - 18 or 25% from combat support units
- 2) Of the 320 soldiers sampled, 12 were female.
- 3) The mean age of the sample was 25.9 years. The range was from 18 to 58 years.
- 4) The mean rank of the sample was E-5. The range was from E-1 to O-3.

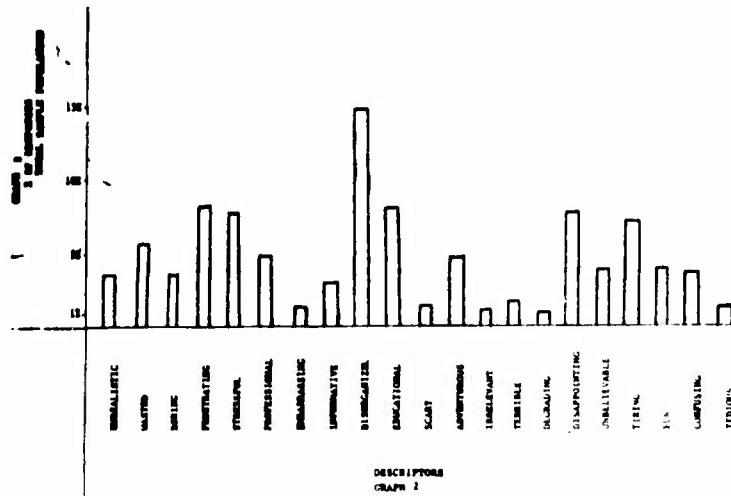
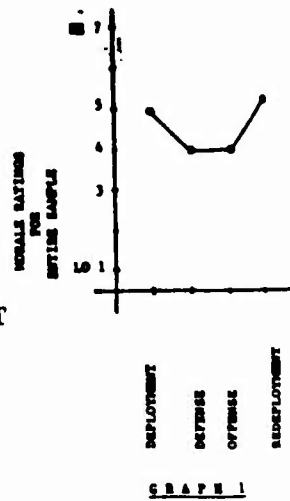
TABLE 2

Comparison between combat arms unit soldiers and combat support unit soldiers on overall personal stress rating.

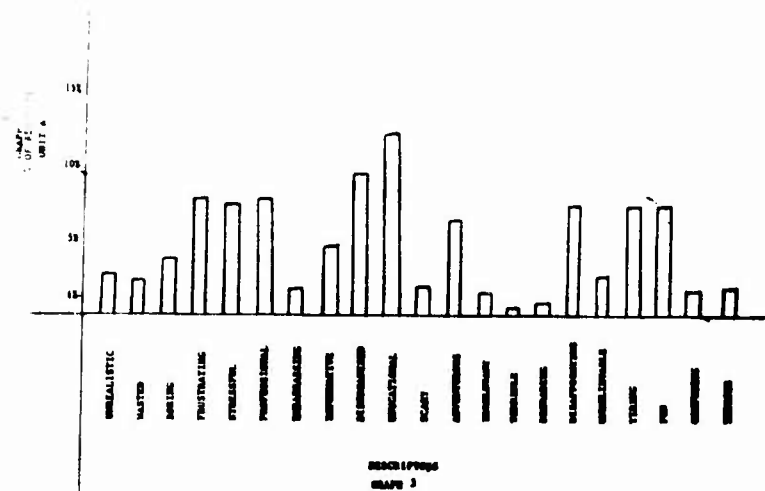
GROUP	MEAN OVERALL STRESS RATING ON 1 to 7 scale
Entire sample	4.41
Combat arms	4.26
Combat support	4.87


 Difference is significant
at $p < .05$

GRAPH 1
MORALE RATINGS THROUGHOUT
REFORGER PHASES



GRAPH 2
DESCRIPTORS ACROSS TOTAL SAMPLE POPULATION



GRAPH 3
DESCRIPTORS FOR UNIT A

APPENDIX 1

Post-REFORGER Questionnaire

1. Name of the individual: _____

2. Date of birth: _____

3. Place of birth: _____

4. Current address: _____

5. Previous address: _____

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